



MENZIES SCHOOL LEADERSHIP INCUBATOR: Insights

July 2021

Prepared by:
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PROMOTING THE
NEXT GENERATION
OF AUSTRALIAN LEADERS

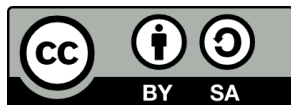
Menzies School Leadership Incubator: Insights

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The research was prepared in accordance with the usual care and thoroughness of the consulting profession.

Executive Summary

Introduction and approach

The Menzies School Leadership Incubator (the Incubator) is a national trans-disciplinary initiative to design, test and learn about transformative innovations that will support lasting systems change in Australian schools' leadership.

This review explores the successes, challenges and learning from work in the Incubator to date, from the perspective of a collaborative seeking longstanding systems change. The design of the review is informed by thinking in the innovation literature, principally communities of practice and socio-technical systems theory.

This review was undertaken as a rapid exploration of experiences and learning, drawing on interviews with eight individuals from within the Incubator (six interviews) and collaborating partners (two interviews).

Strengths and successes to date

The Incubator has built among its collaborators and the wider fellows program a shared understanding of the importance of collective efficacy and leadership challenges facing the education system in Australia. Building this shared understanding took time as members explored the problem itself, and working through the perspectives and frameworks of each member of the collaborative team.

The multi-disciplinary collaborative team brought individual subject matter expertise, different epistemologies, and knowledge bases. There was strong theoretical thinking across the Incubator, and a shift occurred over time towards building collaborative insight. There was clearly a strong collective ownership and respect across all members of the team.

The Incubator is in the stage of implementation and testing and there is much learning still to emerge. Some early results that are evident include a collective efficacy tracking tool and a success profile; an emerging leadership model; and the Menzies School Leader Fellowship Program (MSLFP), which offers the potential to test ideas beyond the Incubator itself. Informal feedback from fellows indicates that the MSLFP is having a significant and sustained impact on their personal outlook towards their own leadership roles in education.

Challenges of trans-disciplinary collaboration

The first two years of the Incubator, as members of the collaborative team looked to build new concepts, tools and approaches to foster collective efficacy, were often challenging for the collaborating members. Understanding different roles and building a coherent structure for learning and action all took time and was not a straightforward task. An innovation incubator is by its nature an evolving space, and some tension between structure and ensuring a flow of ideas was inevitable. This made contributions disjointed and frustrated progress at times.

The lack of a backbone structure to coordinate the program, activate funding, and support the collaboration was identified as a key gap, which was resolved in late 2020.

The range of world views and perspectives across members of the Incubator was at times a barrier to progress, and it took time for members to be able to effectively understand each other's language and frameworks, and as a result this contributed to a sense of siloed working.

In many respects, the collective efficacy challenge is unknown territory. Although collective efficacy was clearly identified as a major solution to achieving improved educational outcomes, how to build collective efficacy is not something that is well established at this stage. In this context of solutions that have not yet been developed, and people who are working through different world views, this created challenges to progress.

In late 2020, there came a watershed moment, which led to a great deal of activity, energy, and ultimately greater clarity, with the Australian Council for Educational Research (ACER) taking on the backbone role. From this point, the Incubator adapted rapidly and is now seen to be a stronger space for both innovation and delivery.

Throughout the challenges of the Incubator, there was an inherent interest and passion in the work, allied with mutual respect for colleagues in the Incubator. There is now an overall sense of optimism, respect and goodwill for each other, as well as for the potential of the Incubator. There is a strong sense of ownership and trust that is continuously developing across the Incubator.

There is seen to be a much clearer leadership role in place, and the role of ACER as a backbone organisation is now also well-established and is providing day-to-day structure that enables the collaborative team to work effectively. There is also a stronger integration of roles across the collaboration and a coherent plan is in place for delivery.

Learning for the future

Discussions with members of the collaborative team highlighted a range of lessons for the future. A clear and shared identification of the problem and system definition was widely seen as critical, alongside a clear backbone to manage accountabilities and deliverables, and to hold the collaboration together.

It takes time to understand each other's perspectives, to become comfortable working in the complexity of this space, and it is important to allow time to build trust, to constructively challenge each other's views, and to build a learning and development space underpinned by fast action cycles.

This is fundamentally a challenging, demanding, and uncertain exercise that needs time to work through. Being comfortable with a degree of uncertainty is an important part of the journey. The culture and relational aspects are highly significant to developing an innovation incubator.

Issues for consideration in the future include:

- Managing the constantly competing demands of structure, delivery, creativity, and innovation.
- Testing and refining the roles of the school Fellows as co-creators of solutions to developing collective efficacy.
- Identifying how Incubator tools and learning will be scaled to deliver the desired system change.
- Monitoring and evaluating impact of the Incubator.
- Clarifying the role of the Advisory Group and other networks in supporting scale and impact.

Acknowledgements

We respect and acknowledge the traditional Aboriginal owners of country throughout Australia.

We pay respect to the Elders past and present for they hold the memories, the traditions, the culture and hopes of Australia's First Peoples.

We acknowledge there are also other Aboriginal and Torres Strait Islander people who live, work in, and contribute to the cultural heritage of Melbourne.

This report has been produced by Adrian Field with contributions from the Menzies School Leadership Incubator.

We would like to acknowledge all collaborators in the Incubator who gave their time and insights for this review. Your thoughtful reflections are deeply appreciated.

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1. Introduction

Background to this review

The Menzies School Leadership Incubator (the Incubator) is a national trans-disciplinary initiative to design, test and learn about transformative innovations that will support lasting systems change in Australian schools' leadership.

From its inception in 2018, the Incubator's role is to co-design, test, and scale solutions to persistent and complex challenges, to answer the question:

How might we build a pipeline of school leaders equipped to lead collective efficacy in increasingly complex and challenging school contexts?

The Incubator operates as a collaboration of experts, with experience across a range of spheres, including education, corporate, and philanthropic sectors. The intention is that this grouping of subject matter experts, working alongside the Menzies School Leader Fellowship Program, will collectively create outcomes that are more than the sum of separate individual efforts.

The focus of the Incubator, which is on leading collective efficacy in the school environment, acknowledges that collective teacher efficacy is a critical element of school improvement and educational outcomes. The complexity of the school leadership roles across Australia are seen to be beyond the capacity of a single leader in a school; collective efficacy provides a way to ensure sustainability and effectiveness of school leaders, and build engagement and leadership of their colleagues (Menzies Foundation 2020). The underlying hypotheses of the Incubator are threefold:

- Globally, and within Australia, the understanding of leadership needs is in transition in recognition of the increasing complexity of the world.
- Within this context, a targeted systemic change is needed in education. There is a transition in the role of school leader from a top-down managerial model to a distributed and shared leadership fit for working in complexity. At the same time, there is also a need to be equipping young Australians – current and emerging leaders – to work and lead in complexity.
- Therefore, there is a need to build practices and evidence for the link between school leadership and complexity. This requires a model that enables transformative innovation that ultimately contributes to wider systems change (Menzies Foundation 2020).

The Incubator approach sits within a broader catalytic philanthropy model of the Menzies Foundation, to invest in areas of national importance and leverage multi-disciplinary collaborations for impact and change, as pictured below.

Our Model

Our guiding principles:

- Honour the leadership legacy of Sir Robert Menzies
- To invest in areas of national importance
- Leverage the power of multi-sector collaborations to drive impact

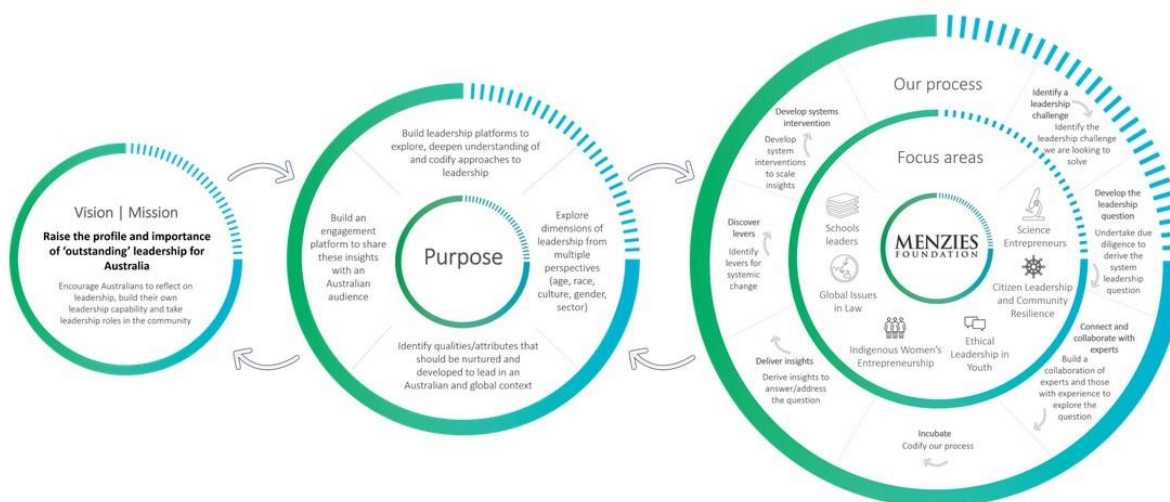


Figure 1: Menzies Foundation model

This review explores the development and implementation of the Incubator in its first two years, and explores learning for future activity, both within the Incubator and for similar initiatives that seek to create systems change.

This report

This report explores the successes, challenges and learning from work in the Incubator to date, from the perspective of a collaborative seeking longstanding systems change. The design of the review is informed by thinking in the innovation literature, which is reflected on in the concluding analysis.

The report is structured into the following areas of discussion:

- Approach to the review (section 2)
- A brief review of insights in the communities of practice, innovation and socio-technical systems theory fields, and parallels with the Incubator (section 3)
- Strengths and successes to date in the Incubator (section 4)
- Challenges in building a trans-disciplinary collaboration through the Incubator (section 5)
- Learning for the future (section 6)
- Reflections on the innovation literature (section 7)
- Conclusions.

2. Approach to the review

This review was undertaken as a rapid exploration of experiences and learning, drawing on interviews with eight individuals from within the Incubator (six interviews) and collaborating partners (two interviews).

Responses were analysed and reported back to a discussion group comprising all six current members of the Incubator, where implications and reflections for practice were discussed.

The interviews were from the outset intended to ensure safe and open discussion of experiences, challenges and hopes for the future. Themes from discussions are reported, but because of the small number of members of the collaborative team overall, no quotes are used from any of the discussions.

All interviews were recorded and transcribed, and analysed for themes emerging from discussions.

The review was undertaken over March to May 2021.

3. Insights from innovation literature

In this section, we focus on two areas of the innovation literature that have relevance to the Incubator: communities of practice, which provides reflections for the development and implementation of the Incubator; and socio-technical systems theory, which offers insights for how innovations such as the Incubator can shift systems and practice.

Communities of practice

The Incubator, in many respects, carries the hallmarks of a ‘community of practice.’ Communities of practice are proposed by Etienne Wenger and colleagues (2011) as a “learning partnership among people who find it useful to learn from and with each other about a particular domain. They use each other’s experience of practice as a learning resource. And they join forces in making sense of and addressing challenges they face individually or collectively.”

Communities of practice are widely acknowledged for their value in advancing innovation through enhancing collaborative efforts, leveraging and mobilising knowledge, and so facilitating change across structures and organisations, and wider systems (Field et al 2019). The Incubator model, with this multi-disciplinary grouping of subject matter experts, aligns well with the communities of practice concept.

Communities of practice are seen as the basic building blocks of a social learning system (Wenger 2000). Wenger (2000) suggests that belonging in a community of practice can be characterised by three modes:

- Engagement, such as the doing of things together including talking, participating in meetings, creating products.
- Imagination, which is about the identity that people construct of themselves, as members of a community, to reflect and act on situations as they unfold.

- Alignment, which relates to making sure the activities of the community are sufficiently linked or aligned to other processes so that they can be effective beyond engagement in a particular community of practice.

Learning between members of a community of practice does not ‘just happen’, it is planned, deliberate and cultivated via practices of shared reflection and sense-making, supported by specific systems for measuring, monitoring and evaluating progress and results. Consequently, the collective learning of the group becomes a bond over time, and as they develop, communities usually build on pre-existing personal networks as well as opportunities for innovative thinking.

Wenger (2002) proposes seven design elements to a community of practice:

- Design for evolution: Acknowledging that communities are dynamic and influenced by members and their evolving interests in shared topics.
- Dialogue between inside and outside perspectives: Emphasising learning from within and outside the group.
- Invite different levels of participation: Acknowledging that different interests and capacities exist, and that participation may vary from those more intensely involved and those more on the fringe.
- Question and foster value from the process: Creating opportunities for value to be realised and harvested.
- Public and private community spaces: Enabling different types of exchange between different community members.
- Familiarity and excitement: Providing both comfort for community members to be open, take risks and share ideas, as well as excitement and adventure to keep participants fully engaged.
- Creating rhythm: Building familiarity, structure and enabling productivity.

The Incubator, at the time of writing, is at an early stage of development and not all of these are fully apparent as yet, as discussed later in this report. They do however provide potential signposts for the Incubator’s future development.

Socio-technical systems theory

Socio-technical systems theory explores how niche innovations progress to become embedded as business as usual within systems and organisations. The challenge is not simply to create innovations that work, but innovations that can be scaled and create shifts in both practice and systems. The collective efficacy challenge that the Incubator seeks to address is one that is embedded in multiple facets of education leadership and systems; the challenge therefore is widely distributed and somewhat resistant to change – intensifying both the importance and the value of the Incubator’s purpose.

Developed by Frank Geels, a ‘socio-technical transition’ is one where social and technological forces come together to create major shifts in systems (Geels 2011). Geels posits that socio-technical systems have three key elements:

- Systems that include supply side (innovation) and demand-side (user environment)
- Actors that are involved in maintaining and changing the system; they carry, reproduce, and challenge the rules in their activities

- Rules and institutions that guide actors' perceptions and activities; they provide constraining and enabling contexts for actors and systems.

Put briefly, socio-technical systems theory proposes that the combination of rules that are regulative (explicit and formal), normative (values, expectations, rights and responsibilities) and cognitive (the frames through which meaning or sense is made), together act within the complex 'regime' of the system to maintain its stability, i.e. to resist change. These regimes combine socio-cultural, policy, science, technological and market forces that together can be very effective, intentionally or unintentionally, in countering the pressures to change.

The diagram below shows the process through which socio-technical transitions are theorised to occur, or which may be prevented from occurring through the interrelationship of rules that govern systems. There are three levels of interplay:

- Niches: the locus for radical innovation; these are often protected spaces where innovation is permitted to operate and even flourish. The Incubator can be seen as one such niche, and one of many education innovations in a range of settings that occur simultaneously.
- Socio-technical regimes: the 'deep structure' of established rules and systems that stabilise current practice, and are shaped by technological, scientific, policy, socio-cultural and market forces. These are the systems that are well-established, and which can prevent the development and spread of collective efficacy.
- Socio-technical landscape: the wider context that influences niche and regime dynamics, including trends, values, ideologies, and macro-economic patterns (Geels 2011).

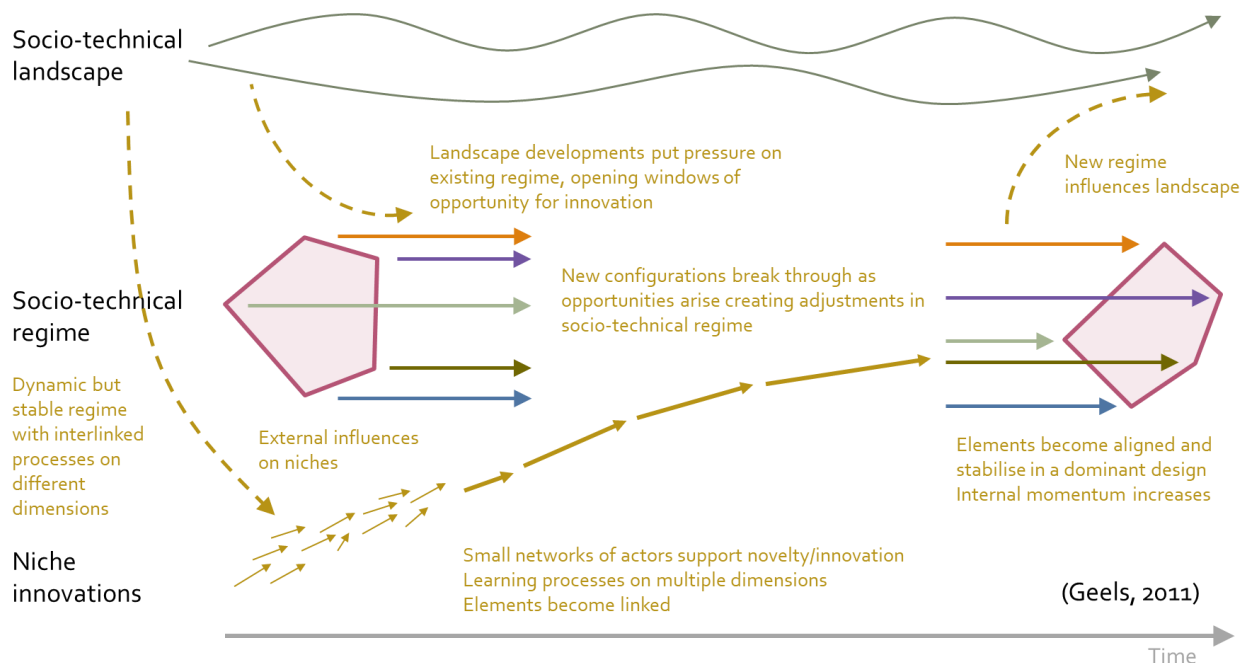


Figure 2: Socio-technical systems – from niche innovations to system change

For a niche innovation to become sufficiently embedded to ‘nudge’ changes in systems, a combination of factors is needed that can work at macro (state/national/international); meso (city or region); and micro (community) levels (Marletto 2014). This is a non-linear process involving a complex interplay of different factors. New innovations must break through to the socio-technical regime as opportunities arise, creating adjustments, stabilising and eventually establishing themselves as the new regime, in turn influencing or shifting the socio-technical landscape.

Such shifts are hugely challenging because there are many ways in which the actors within a dominant system work to preserve their position – as anyone trying to nudge the dominant position of the car in transport systems has found, where a range of industries and interests have successfully resisted change for some decades (Cohen, 2012).

The challenge for such innovations as the Incubator, is if they are simply treated as isolated pilots, we lose sight of the system issues that can constrain or enable successful outcomes, and the broader system levers and changes that we need to scale local innovation. Institutions, power dynamics, incentives and politics – factors that contribute to the complexity of systems – all matter for bringing about change (Field 2019). The role of the Incubator may therefore need to include exploring where the system needs a nudge, and the extent to which different parts of the system are responsive to being nudged, as much as whether the Incubator’s individual prototypes should be continued or expanded. A systems mapping exercise, combined with engagement across the Incubator’s networks of influence, may be helpful to explore areas where key leverage points for collective efficacy may exist.

4. Strengths and successes to date

Collective understanding of the Incubator

Across all interviewees, there was a common understanding that the Incubator came together with the purpose of bringing multiple perspectives to confront systemic challenges in education. It was widely agreed that there would be greater value achieved through this collective approach, than through any one organisation acting alone. The Incubator approach was seen to be one that could overcome professional and sectoral silos, and enabled people to work together bringing their different perspectives to the issue.

However, building that shared understanding of purpose, by the very nature of the complex issues they were confronting, took time – to bring together different strands of thinking and practice; to understand the collective efficacy problem; to understand leadership issues that were unfolding; and to identify what it takes to build a pipeline of emerging leaders in education. There was also time needed to build an understanding of why a collaborative itself is needed, and why any one individual person or organisation does not have the answers to the challenges that the collective efficacy issue posed.

Ultimately what emerged was a shared understanding of the collective efficacy issue and leadership challenges facing the education system in Australia. There was a shared acknowledgement that this was not a technical challenge or a program that could solve a problem, but a significant complex challenge that operates from multiple fronts, and which confronts leaders in the education system today. Key areas of the shared understanding revolved around the following:

- Building a talent pipeline that could provide the necessary leadership into the future
- Enabling schools to navigate the ever-increasing complexity of the world they are in
- Accelerating learning outcomes for students
- Developing understanding of the supports required to develop important leadership characteristics of collective efficacy.

Core strengths

In discussions with the members of the collaborative team, there were a range of strengths that were identified in the Menzies Incubator. These included:

- A strong and passionate multi-disciplinary collaborative team, each bringing individual subject matter expertise, different epistemologies and knowledge bases.
- Very strong theoretical thinking that unfolded across the Incubator from those involved.
- A shift in individual thinking towards building collaborative insight.
- A strong collective ownership and respect across all members of the team.

There was also seen to be a deeper sense of purpose that developed over time, whereby people understood each other's roles and contributions; and a collective commitment, or 'skin in the game' that is now apparent.

The catalytic philanthropy orientation of the Menzies Foundation, and therefore the Incubator, is also seen as an important strength. This marked a significant shift for the Menzies Foundation, from providing individual grants for scholarships, to catalysing or instigating system change through understanding the nature of the problems that are constraining or preventing educational outcomes.

Emerging successes

It is widely acknowledged that even after two years, the Incubator is still at an early stage of its life, and this has implications related to showing impact. The Incubator is in the stage of implementation and testing, and there is much learning still to emerge. There is, however, high value seen in bringing different subject matter experts together, with the following results evident:

- The Incubator has developed a collective efficacy tracking tool and a success profile.
- A leadership model is emerging and being articulated.
- The Menzies School Leader Fellowship Program (MSLFP) is seen as a significant strength, and one which offers the potential to test ideas beyond the Incubator itself. It is seen to provide a 'sandpit' for learning, offering peer-to-peer learning opportunities and strengthening the leadership potential of individual members of the MSLFP.
- Informal feedback from fellows indicates that the MSLFP is having a significant and sustained impact on their personal outlook towards their own leadership roles in education.

5. Challenges of trans-disciplinary collaboration

Role and structure definition

A common challenge identified in discussions with the Incubator members was a lack of role and structure definition. There was widely seen to be a lack of a clear role definition across the team and within the overall purpose of the Incubator, or a strong authorising or accountability structure.

The architecture of the Incubator was also seen to be unclear, in terms of how the different elements of the Incubator fit, and how they will collectively create systemic change. This was despite attempts at different stages to establish a program architecture in different ways. The Incubator was being implemented at a time when those who participated were unsure of the design and unsure who was responsible for delivering components.

Although roles were defined from early 2020, it took another year for roles to be seen to be actualised within a clear authorising structure and, as a result, the deliverables and timeframes were similarly unclear.

It was acknowledged however that part of the value of an innovation space is often in the ‘storming and norming’ phases, i.e. the need for debate, reflection and instilling a culture; and that a structure that is too rigid at an early stage may have undermined such a space. Any innovation incubator is an evolving space and some tension between structure and the flow of ideas is inevitable.

There was also seen to be a lack of agency and ownership of roles and the contribution that members could make within the Incubator. Contributions were disjointed and there was a common issue of either delivery failure or only just-in-time delivery, which undermined the strength of work undertaken through the group.

There also seemed to be a lack of clarity around the role of fellows in the MSLFP. It was unclear if they are simply receiving a program, or if they are co-creating solutions to the leadership issue in Australian education. It was felt that the Incubator development was not always in tune with how the fellows themselves were working, that they were often working out of step, and the way in which they could leverage off each other was not being fully realised.

Similarly, the role of the Advisory Group was brought into question. It was seen to be a coalition or a collective of some significant leaders in education and other spheres, but they worked in a way that was separated from the context of the Incubator and an understating of how the collaborative operates. There was a lot of time and effort that went into servicing the Advisory Group but at a very premature stage before findings had sufficiently emerged.

Backbone structure

A further issue that was raised by many members of the collaborative team was the lack of a backbone structure that occurred for some time. The concept of a ‘backbone organisation’ is well-established in the collective impact literature (Kania and Kramer 2011); such structures have the role of resourcing and coordinating the program, activating funding, and serving the collaboration with dedicated staff. The backbone organisation has a critical role in mediating conflict among members,

focusing people's attention and maintaining momentum in a constructive way that navigates obstacles that are encountered.

The Menzies Foundation was seen to be leading and funding the initiative, but there was not seen to be a backbone structure to provide the day-to-day organisation, the connections internally within the Incubator members, and also connections with external stakeholders.

There was not seen to be mechanisms for driving action cycles and bringing together the different worldviews that came through the different members of the Incubator. Nor was there a shared understanding of how funds were being used or shared decision-making on the use of funds.

Although there was a design role that was seen to be facilitating the different parts of the Incubator, and the people involved, this in itself was not able to provide the backbone. While there was a funding mechanism in place, there wasn't seen to be an accountability mechanism that operated to ensure that the Incubator was well integrated and able to deliver. By late 2020 this changed, and the Australian Council for Educational Research (ACER) had taken on that role (discussed further in subsequent sections).

Reconciling world views

Reconciling the different worldviews or the professional languages, perspectives and frameworks that each member of the Incubator brought to the collaborative was a further challenge. Each member of the Incubator had substantial experience and expert insight into their respective field of activity, but it took a long time for people to be able to effectively understand each other's language and frameworks.

Unsurprisingly, each member could speak passionately from their own perspective and interpretation, and it took some time for all members to understand the different perspectives that each brought, and the different ways of thinking about or approaching the problem. As a consequence, people were seen to be working in silos and there were intellectual tussles between different, and even competing, frameworks.

It was felt that this at times undermined the respect that was needed for different professional expertise. These different professional languages, outlooks and frameworks meant that often people were unable to agree, and they were also speaking past each other. It therefore took some time to realise the power of bringing these different people together.

Building approaches that can come out of these frameworks and reconciling them was seen to be something that took time, and some reflected that insufficient time was invested in bringing together these different outlooks at an early stage.

Reflection points

Inevitably, some tension points arose in the Incubator's development. In part, the collective efficacy challenge is unknown terrain. Although collective efficacy was clearly identified as a major solution to achieving educational outcomes, how to build collective efficacy is not something that is well established at this stage. In this context, where solutions have not yet been developed, and people are working through different worldviews, some tensions became evident.

At the same time, the Board of the Menzies Foundation was in the process of understanding and grappling with what it means to transition from providing scholarships to being a catalyst for system change. There was significant pressure within this situation of an unknown terrain to pursue deliverables and create something new, when what was required was the time and space to grapple with a new way of thinking and a new way of approaching a problem.

The work of the Incubator and the relations within the Incubator team were seen by some as not creating a place of psychological safety, at times. The dynamics were seen to be undermining both creativity and confidence within the Incubator.

On reflection, some pointed to the lack of a sense of agency to ask both basic and challenging questions of each other. There was a general sense of being at odds with each other, and perhaps all erred towards trusting that the collaboration had matters in hand, rather than questioning the unfolding situation.

It was also notable that many members of the Incubator were consultants themselves, and there was a steadily unfolding tension between working in a collaborative, and simply working on consulting assignments. It took time to reach a stage where members both worked as consultants and at the same time were committed to building collective success. At the same time, members spoke of their own individual commitment to the project, but there was a concern that some of the organisations behind the individuals involved were not as committed.

In late 2020, there came a watershed moment, which led to a great deal of activity, energy and ultimately greater clarity, with ACER taking on the backbone role. From this point, the Incubator adapted rapidly and is now seen to be a stronger space for both innovation and delivery.

For some, the way this moment unfolded was not experienced as a safe space to work through the challenge and, as one interviewee wanted to make clear, it was possible to get to that point of clarity without having to go through that highly tense point in the development of the Incubator. Yet, as is discussed below, the Incubator has held its integrity and has moved to a stronger position of delivery.

Holding the collaboration

Despite the tension points, the collaboration continues and at the time of writing there is strong commitment among all parties to succeed. There are a range of features that are holding the collaboration together. Perhaps the strongest holding factor in the collaboration is clarity itself. There is seen to be a much clearer leadership role in place, and the role of ACER as a backbone organisation is now also well-established and is providing day-to-day structure that enables the collaborative to work effectively.

Also, a clearer structure for the work has been developed, and for some, a clearer structure itself enables creativity rather than holding creativity back. There is also a stronger integration of roles across the collaboration and a coherent plan is in place regarding delivery.

While many members were keen to point out that they are still on the journey, good progress is now being made in the Incubator. There is an appreciation across the team of their collective persistence in the face of challenge.

A further factor that is holding the collaboration together is an overall sense of optimism, respect and goodwill. There is a strong sense of ownership and trust that is continuously developing across the Incubator. For all members, there is an inherent interest and passion in the work. Even among those who had not worked in this space before, the application of their professional expertise to the collective efficacy issue is something that is of great interest, and seen as a worthwhile personal professional challenge. There is also a strong opportunity seen for personal learning in this space and the 'moral purpose' in the nature of the work is a strong attractor.

Finally, what is common among many of the interviewees is the belief that system change is possible. There is a belief across the team that collectively they can achieve more for educational leadership, and there is strong passion for the work and investment in the challenge.

6. Learning for the future

Discussions with members of the collaborative team highlighted a range of lessons for the future. **A clear and shared identification of the problem and system definition** is fundamental to this. This requires asking the basic interpretative questions of each other's perspectives, roles and frameworks, alongside the questions about project delivery.

It requires an agreement and a path forward regarding how to operationalise the learning and the decisions made, and **a clear structure for delivery** that includes a clear set of deliverables. It became clear that role clarity and structure were more important to the success of the Incubator than many appreciated at the outset – that innovation itself needs a structure and process within which to flourish.

Many talked also about the importance of **investing in the design before the delivery**. It takes time to understand each other's perspectives, to become comfortable working in the complexity of this space, and it is important to allow time to build trust, to have an opportunity to constructively challenge each other's views, and to build a learning and development space through that. Efficient and/or regular action cycles, with recurring learning points, have become more embedded in the work of the Incubator and are seen to be driving its current success.

A further area of important learning is the need for **a clear backbone to manage accountabilities and deliverables**, and to hold the collaboration together. It was seen that there was a challenge of being the funder and also being seen to lead the work. The backbone role is important in providing a complimentary role and galvanising resources, stakeholders and advocacy and in some ways working alongside and in partnership with the funder. The backbone also provides program management that drives the vision of the program and the experience here highlights the importance of investing in structure, and role clarity, which allows and balances the flexibility to innovate.

It should not be overlooked that **this is fundamentally a challenging, demanding and uncertain exercise** that needs time to work through. Being comfortable with a degree of uncertainty is an important part of the journey. Alongside this, continuing to check in with each other, to check each other's perspectives and assumptions, and to continue to foster inquiry and learning, seems important.

Culture and relational aspects are highly significant to developing an innovation incubator. Culture is built and developed from the outset of an initiative, but culture can also change and adapt. As seen in this review, culture can noticeably shift over time and in the case of the Incubator, this was in a positive direction.

It appears that the Incubator, working within a clear structure for delivery, still enables innovation by having **sufficient 'slack in the system'** to be able to think in different ways and offer new approaches, while also being pushed towards delivering on the agreed program of work.

From these discussions, there are some issues that require further consideration:

- The Incubator is still early in the process and it is not yet at a point to be able to demonstrate its effectiveness.
- Managing the competing demands of structure, delivery, creativity and innovation, and having enough slack in the system to enable innovation alongside the structure is a constant challenge. Retaining a curious, exploratory, ground-breaking focus, while attending to delivery demands is a constant challenge.
- There are also questions of what does co-creation actually mean for MSLFP participants? Is there a role for fellows in co-creating solutions to the collective efficacy challenge? And is there a role for fellows in contributing to learning and scaling?
- The Incubator is clearly focused on achieving system change in multiple ways, but the potential timeframes for scaling, and the readiness for achieving system change is still to be determined. The interest is not in scaling the Fellows' program as it stands, but to incubate approaches to see what insights and learnings can be scaled. It is still to be made clear what will be scaled; is it a program; is it a series of system innovations; and/or is it a whole way of thinking? And from this, what are the indicators that we would expect to see of effective scaling?
- What is the role of the Advisory Group in providing both collaborative insight, and influencing and/or catalysing action to support wider scaling?

7. Reflections from the literature

Returning now to the highlighted areas of the innovation literature, there are some further observations that are worth considering for the Incubator.

From the communities of practice literature, it took time for the Incubator to work through the processes of engagement and imagination, before reaching the alignment needed to make sustained progress. At the time of this review collegiality, reciprocity and shared expertise and ownership, were all evident, and this gives confidence for the future success of the Incubator.

Some aspects of the key design elements for such communities are becoming well-established, particularly designing for evolution, questioning and fostering value, and creating rhythm and structure. Looking ahead, the Incubator may benefit from considering the more outward facing aspects of communities of practice that can build momentum for influence and change. These might include building dialogue between inside and outside perspectives (utilising the Advisory Group and other strategic networks), and fostering both public and private community spaces where external discussion and debate is possible, balanced by the ability to be open and reflective within the Incubator team. Alongside this, there is the need for ongoing and embedded monitoring and evaluation within the Incubator to track progress and impacts, and surface learning.

Socio-technical systems theory highlights the challenges of niche innovations, of which the Incubator can be seen as one, in transforming from an isolated oasis of innovative thinking and practice to broader system change. Even within the Incubator, building new ways of working that deviate from existing practice, even when the niche is sanctioned by the system owners, has taken significant, sustained and challenging effort. The transfer of learning from small-scale interventions to other contexts and spaces is a significant challenge for innovation. For the Incubator, scaling its work to impact wider practice will take more than just doing more of the interventions; scaling will require a broader mandate to change existing rules and normative practice.

The Incubator is intentionally testing a range of approaches, tools and concepts for wider application and scaling in multiple contexts. Some reflections on scaling innovation offer potential directions for scaling the Incubator's work to date. Cabaj (2018) suggests five forms of scaling that should be considered in taking innovation to a greater level of adoption and impact:

- Scaling out: Expansion of an innovation, such as aspects of the MSLFP, or the tools developed through the Incubator.
- Scaling up: Changing how the system works (policy, regulation, relationships, practices and resource flows) that can build collective efficacy more widely and expand the influence of the Incubator.
- Scaling deep: Changing hearts and minds of people, organisation, system or communities to more consciously embrace collective efficacy and supporting approaches in their work.
- Scaling scree: Encouraging or cultivating other innovations that seek the same outcome.
- Scaling infrastructure: Improving the capacity of a system to scale, through policy and systems change and investment.

Not all of these scaling elements are in the power or influence of the Incubator, or the Menzies Foundation. There is, however, the opportunity to spread ideas and thinking, working through the Advisory Group, networks of other experts, and influencers. This may well play an important role in scaling collective efficacy practice, concepts and system change.

8. Conclusions

The experience of the Incubator highlights the complex non-linear path that innovation initiatives often take as they seek to address complex, multifaceted problems. Establishing a new team with different skills and personalities; surfacing different perspectives, mind sets and assumptions; and coalescing these into a program for change, and ultimately system change and impact, are long-term endeavours.

In its own formula for high-performing teams, the Google corporation identifies five core conditions: psychological safety; dependability; structure and clarity; meaning or sense of purpose in the work; and potential for impact (Google 2016). With these in mind, the Incubator appears to be increasingly placed to deliver on its mission, through having these prerequisites in place. Although some of these conditions were variable in the earlier stages of the Incubator, the last two conditions (meaning and the potential for impact) remained constant, and are perhaps what held the Incubator to its purpose and to each other, despite the challenges.

Whilst there is much still to be done in channelling learning from the Incubator into the wider education system, the consensus of those who took part in this review is that the incubator is now well-positioned for delivery and impact.

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